

At times it will be necessary to change the deposit amount or due date for a large group of students. In order to facilitate this process a group change function is available to accelerate this process. The process requires the export of records from PeopleSoft, the removal of non-relevant records, and the import of those records back into PeopleSoft with the desired changes.

Note: When a student has paid for their Admission Deposit via online banking it can take three to five days for the payment to be posted to their account. Until then it will show as not paid within the Student Center.

1. Click the [Reporting Tools](#) link.

[Reporting Tools](#)

2. Click the [Query](#) link.

[Query](#)

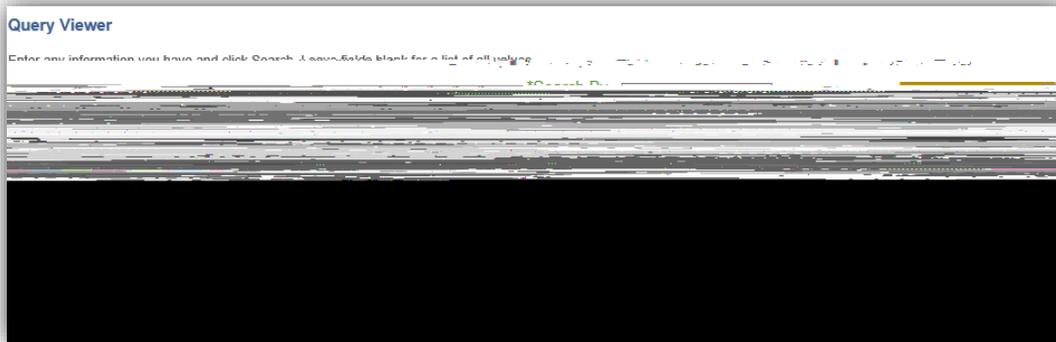
3. Click the [Query Manager](#) link.

[Query Manager](#)

4. Enter **ucad_admin_deposit** into the Search by begins with field and press Enter or Search
Click the [Search](#) button.

5. The query **UCAD_ADM_DEPOSIT_MASS_CHANGES** display and is the query required to begin the process. It is recommended to save it as a favorite. Click the [Run to Excel](#) link.

[Run to Excel](#)



6. Enter the institution directly (UCALG) or use the Look up tool. Click the [Look Up](#) button.



7. Click the [Look up Career](#) button and click the [UGRD](#) link.

[UGRD](#)

8. Click the [Look up Admit Term From](#) button (e.g. Fall 2015 2157). Click the [2157](#) link.

[2157](#)

9. Click the [Look up Admit Term To](#) button (e.g. Fall 2016 2167). Click the [2167](#) link.

[2167](#)

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14. Some formatting must be completed prior to saving the file. Select the students you wish to update

Group Change Deposit Amount and Due Date

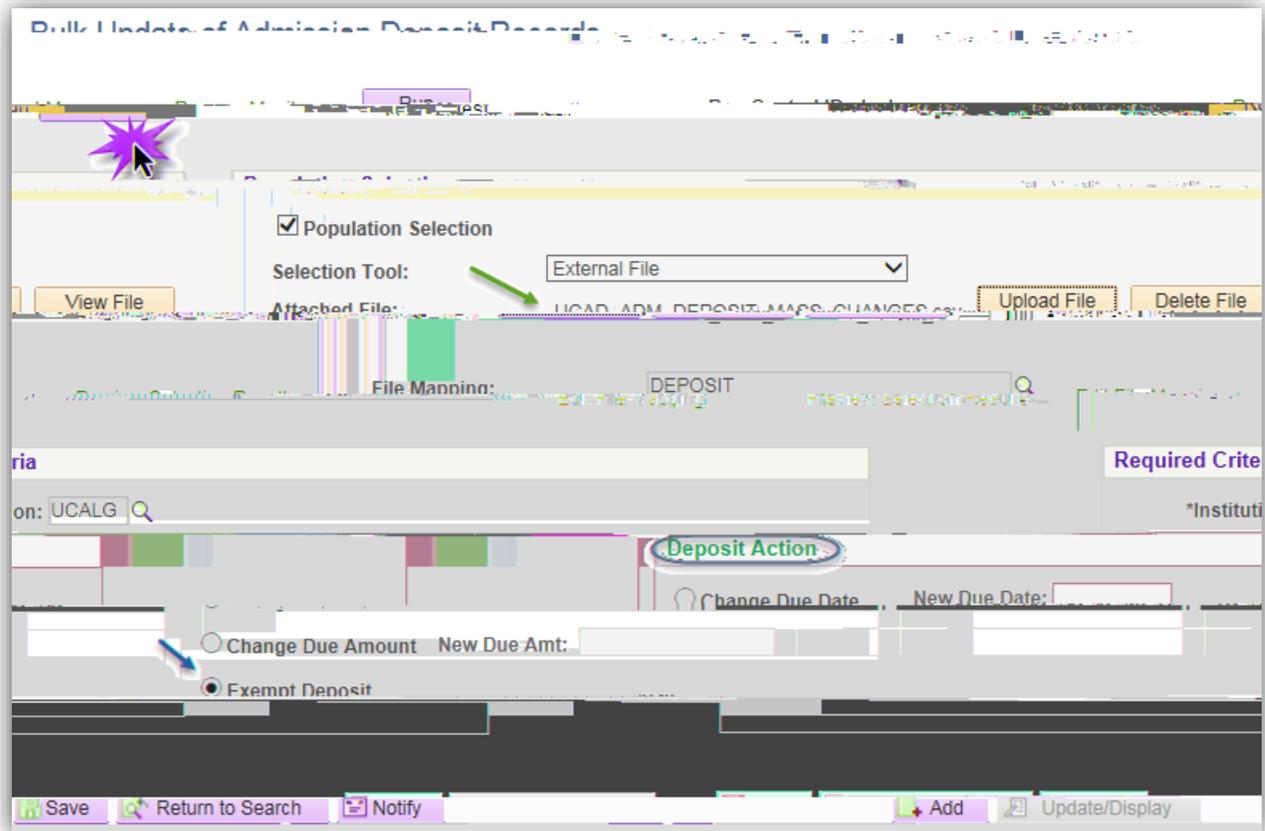
SA – Admission Deposit



6. Enter the desired run control (e.g. test). Run controls must be one word with no spaces. However, if you wish to use more than one word use underscores to join the words (e.g. long_run_control). Click the **Add** button.
7. From Bulk Update of Admission Deposit Records complete the Selection Tool list. Click the **Selection Tool** list.
8. Select External File to enable browsing for the .csv file saved earlier. Click the **External File** list.
9. After selecting External File, click the **External File** list.

13. Make the applicable Deposit Action selection (e.g. Change Due Date, Change Due Amount) for this example we will use Exempt Deposit. Click the **Run** button.

Run



14. On the Process Scheduler Request page, click the **OK** button.

OK

15. Process Instance: number indicates the process has been queued to the processor. Click the **Process Monitor** link.

Process Monitor

16. The Process List will display any processes queued, processing and success. Clicking refresh enables to you view the progress of the run control. Click the **Refresh** button.

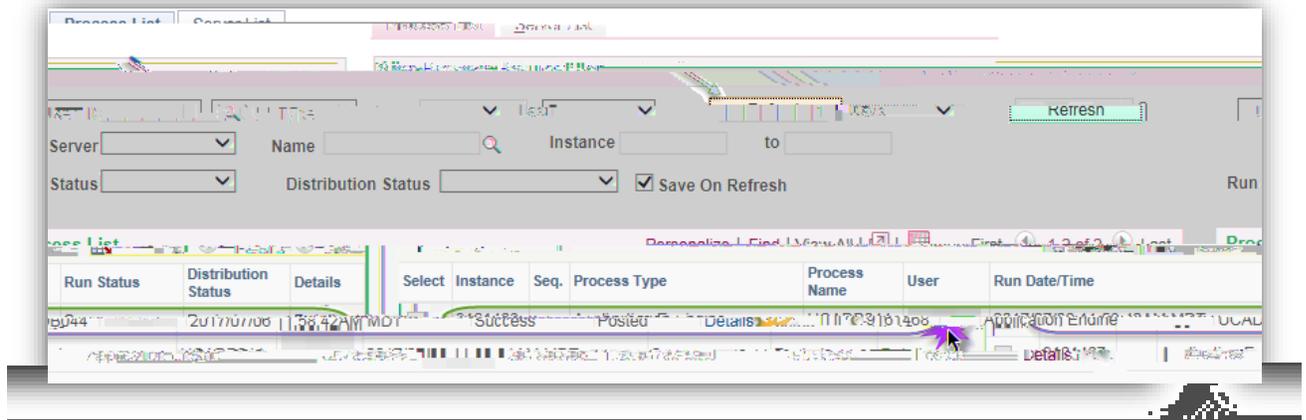
Refresh

Group Change Deposit Amount and Due Date

SA – Admission Deposit

17. Once the process is Success > Posted the details link is available. Click the [Details](#) link.

[Details](#)

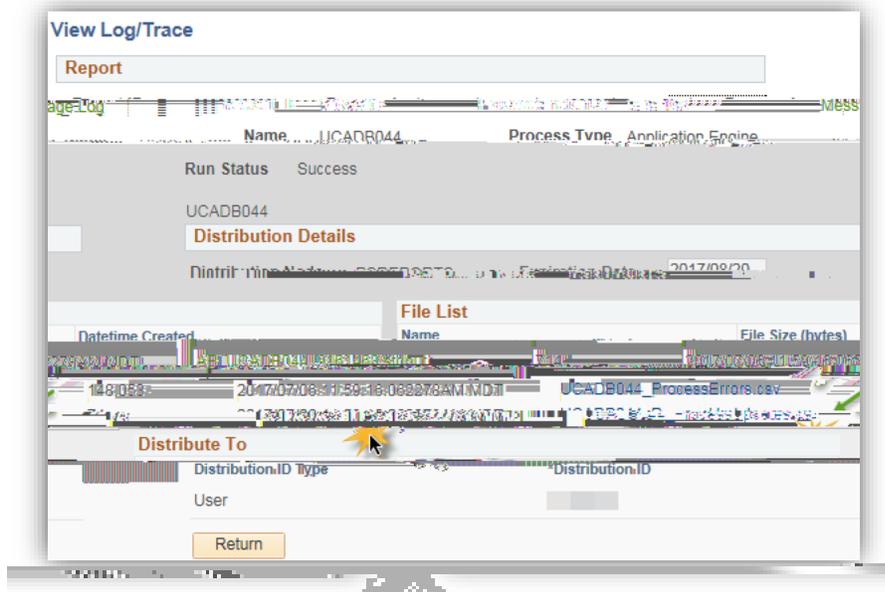


18. Click the [View Log/Trace](#) link.

[View Log/Trace](#)

19. Two files will be listed on the File List: **Process Updates** and **Process Errors**. Click the [UCADB044_ProcessUpdates.csv](#) link.

[UCADB044_ProcessUpdates.csv](#)



Group Change Deposit

Amount and Due Date

SA – Admission Deposit

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Amount and Due Date

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22. Return to the View Log/Trace and view the Process Errors.csv file. Click the